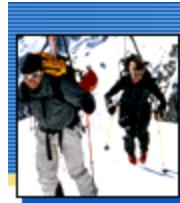


U.S. Army 2005 MWR Leisure Needs Survey



**Fort A.P. Hill
Virginia**

CALIBER
an ICF Consulting Company

BRIEFING OUTLINE

Fort A.P. Hill

Ⅰ **LEISURE NEEDS SURVEY**

- Project Overview
- Methodology
- Patron Sample
- Products

Ⅱ **SURVEY RESULTS**

- MWR Programs and Facilities
- Leisure Activities

Ⅲ **NEXT STEPS**

PROJECT OVERVIEW

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MWR STRATEGIC BUSINESS PLANNING MODEL

COMPONENTS

Analyzing and forecasting the external environment

Analyzing programs and markets

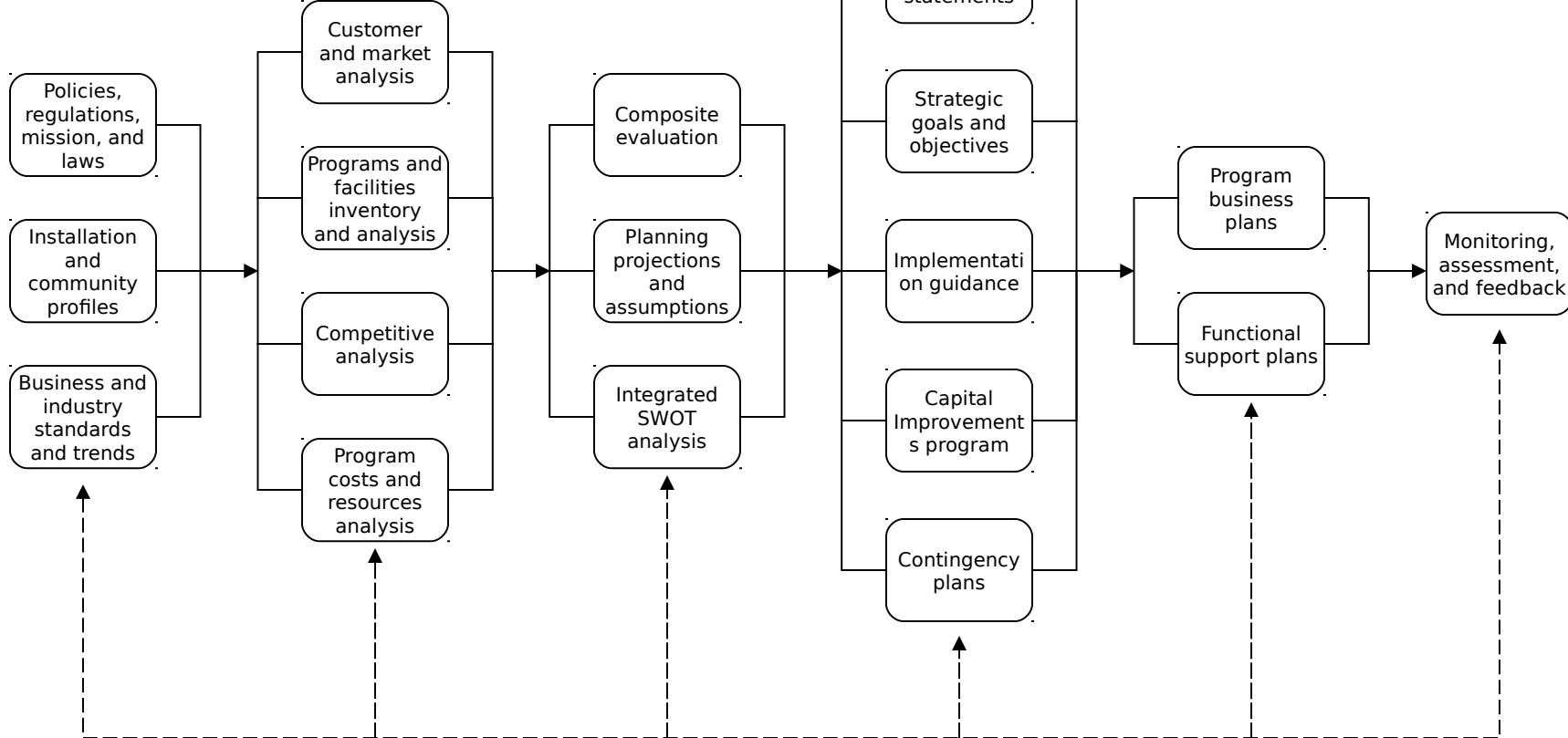
Developing alternatives

Formulating the strategic business plan

Formulating operational business plans

Monitoring and evaluating plan implementation

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METHODOLOGY

Fort A.P. Hill

□ PROJECT SCOPE

- 92 sites were surveyed in 2005
 - Northeast (21 sites)
 - Northwest (10 sites)
 - Southeast (13 sites)
 - Southwest (14 sites)
 - Europe (20 sites)
 - Korea (9 sites)
 - Pacific (5 sites)
- 249,555 surveys were distributed throughout the Army to 4 patron groups:
 - Active Duty Soldiers
 - Spouses of Active Duty Soldiers (CONUS only)
 - DA Civilians
 - Retirees (CONUS only)
- 350 surveys were distributed at Fort A.P. Hill



□ SURVEY ADMINISTRATION

- Designed to collect information on installation MWR programs and facilities as well as the leisure activities of your potential market
- 65 multiple choice questions; 7 questions were tailored to your specific installation issues

METHODOLOGY

Fort A.P. Hill

□ **SURVEY ADMINISTRATION (Continued)**

- Active Duty and DA Civilian surveys distributed by installation POCs
- Spouses of Active Duty and Retiree surveys direct mailed to home addresses (CONUS only)
- Web survey option offered for the first time to all respondents

METHODOLOGY

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□ SURVEY SAMPLE

- Four population segments
 - Active Duty
 - Spouses of Active Duty (CONUS only)
 - Civilian Employees
 - Retirees (CONUS only)
- Response Rates and Confidence Intervals for each patron group and overall sample

	<u>Survey Population</u>	<u>Surveys Distributed</u>	<u>Surveys Returned</u>	<u>Response Rate</u> *	<u>Confidence Interval</u> **
Army:					
Survey Totals	1,212,240	249,555	50,651	20.91%	±.43%
Fort A.P. Hill:					
Active Duty	8	7	1	14.29%	±91.67%
Spouses of Active Duty	6	8	3	37.50%	±40.01%
Civilian Employees	275	212	74	34.91%	±9.74%
Retirees	125	123	21	17.07%	±19.51%
Total	414	350	99	28.29%	±8.59%

* Response rate is calculated by dividing the number of surveys returned by the number of surveys distributed. It should be noted that low response rates (i.e., less than 20%) increase the chance that one or more subgroups (e.g., for active duty patron group, E1-E4 is a subgroup) may be over- or under-represented. Any patron groups with fewer than 15 survey respondents do not have their data reported to protect privacy and ensure representativeness.

**A confidence interval for a sample mean tells us the range in which we are likely to find the true population mean: Assume 300 surveys were returned for an active duty patron group of 1,350. 52% responded that they used the gym in the last year. The 95% confidence interval for this case would be ±5%. Thus there is a 95% chance that the TOTAL number of active duty at this installation who used the gym last year is between 47% and 57%. We can be 95% confident that between 634 and 770 active duty used the gym.

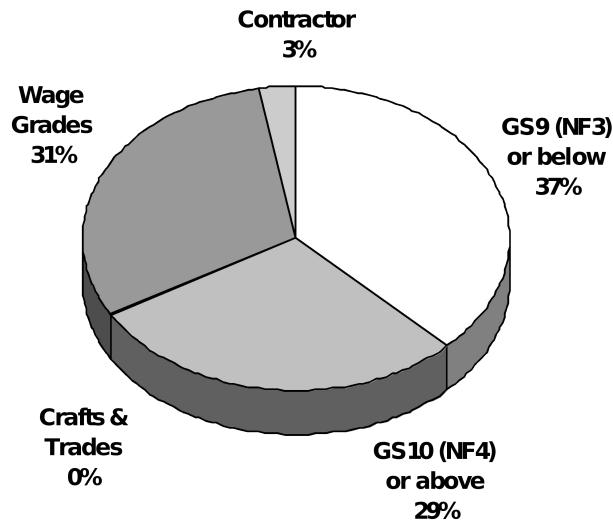
PATRON SAMPLE*

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RESPONDENT POPULATION SEGMENTS

CIVILIANS

(n = 73)



RETIREES

(n = 13)



*The n provided for each patron group is equal to the number of respondents who provided their rank or paygrade.

PRODUCTS

Fort A.P. Hill

□ **PRODUCTS**

- Comprehensive installation report of survey data in electronic form
- SPSS data file provided to installation representatives for further analyses, if desired
- Installation level briefing of findings
- IMA and Army level roll-up reports and briefings

□ **PRODUCT DISTRIBUTION**

- All products provided on CD
- CD distribution to installation MWR Directors, IMA Headquarters, and U.S. Army Community and Family Support Center

MWR PROGRAMS & FACILITIES: USAGE AT FORT A.P. HILL

Fort A.P. Hill

MOST FREQUENTLY USED FACILITIES

Car Wash	42%
Fitness Center/Gymnasium	39%
Post Picnic Area	32%
Recreation/Community Activity Ctr.	
31%	
ITR - Commercial Travel Agency	13%

LEAST FREQUENTLY USED FACILITIES

Multipurpose Sports/Tennis Courts	7%
Athletic Fields	7%
Outdoor Recreation Center	8%
Swimming Pool	9%
Cabins & Campgrounds	11%

MWR PROGRAMS & FACILITIES: SATISFACTION AT FORT A.P. HILL*

Fort A.P. Hill

FACILITIES WITH HIGHEST SATISFACTION RATINGS*

Recreation/Community Activity Ctr.	
4.27	
Outdoor Recreation Center	4.22
Cabins & Campgrounds	4.16
Fitness Center/Gymnasium	4.07
ITR - Commercial Travel Agency	4.05

FACILITIES WITH LOWEST SATISFACTION RATINGS*

Car Wash	2.09
Swimming Pool	3.05
Athletic Fields	3.55
Multipurpose Sports/Tennis Courts	3.64
Post Picnic Area	3.67

*Programs and facilities were rated on a 5 point scale: 5 = Very Satisfied and 1 = Very Dissatisfied

MWR PROGRAMS & FACILITIES: QUALITY AT FORT A.P. HILL*

Fort A.P. Hill

FACILITIES WITH HIGHEST QUALITY RATINGS*

Recreation/Community Activity Ctr.	
4.12	
Fitness Center/Gymnasium	3.98
ITR - Commercial Travel Agency	3.94
Outdoor Recreation Center	3.94
Cabins & Campgrounds	3.80

FACILITIES WITH LOWEST QUALITY RATINGS*

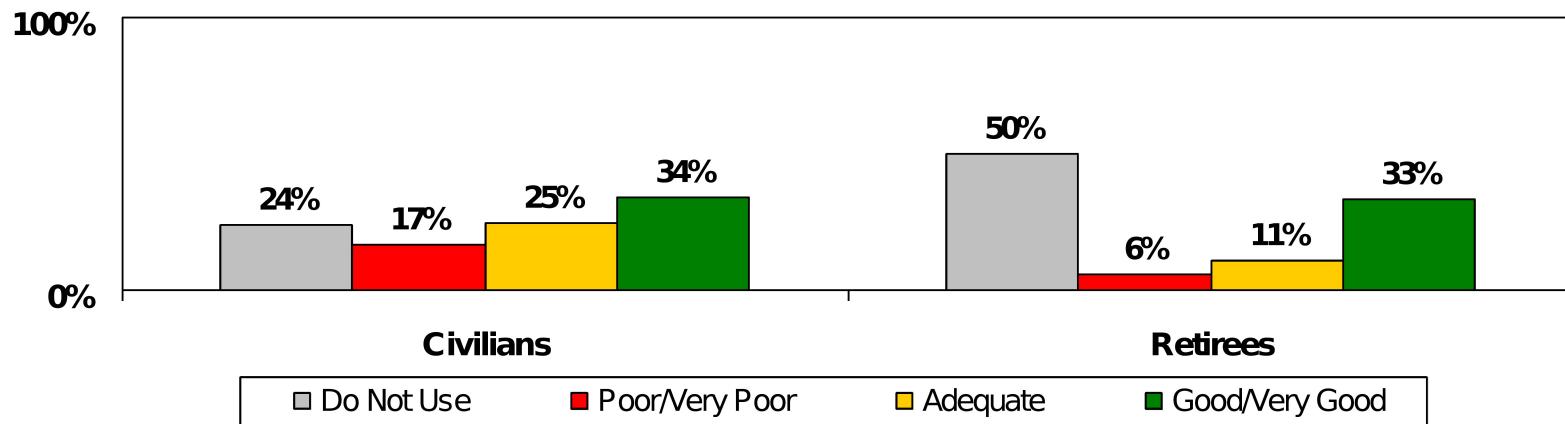
Swimming Pool	2.63
Car Wash	2.74
Athletic Fields	2.90
Post Picnic Area	3.21
Multipurpose Sports/Tennis Courts	3.52

*Programs and facilities were rated on a 5 point scale: 5 = Very Good and 1 = Very Poor. These ratings are an average of three quality scores: Building/Facility/Space, Equipment/Furnishings, and Personnel.

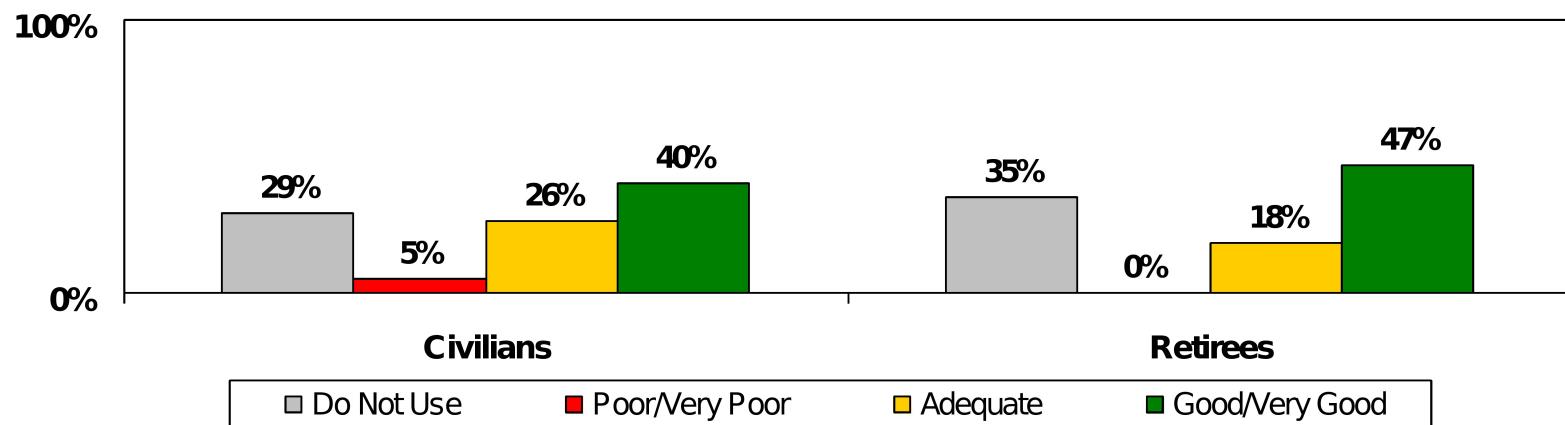
MWR PROGRAMS & FACILITIES: FOOD AND BEVERAGE SERVICES QUALITY

Fort A.P. Hill

Quality of On-Post Services



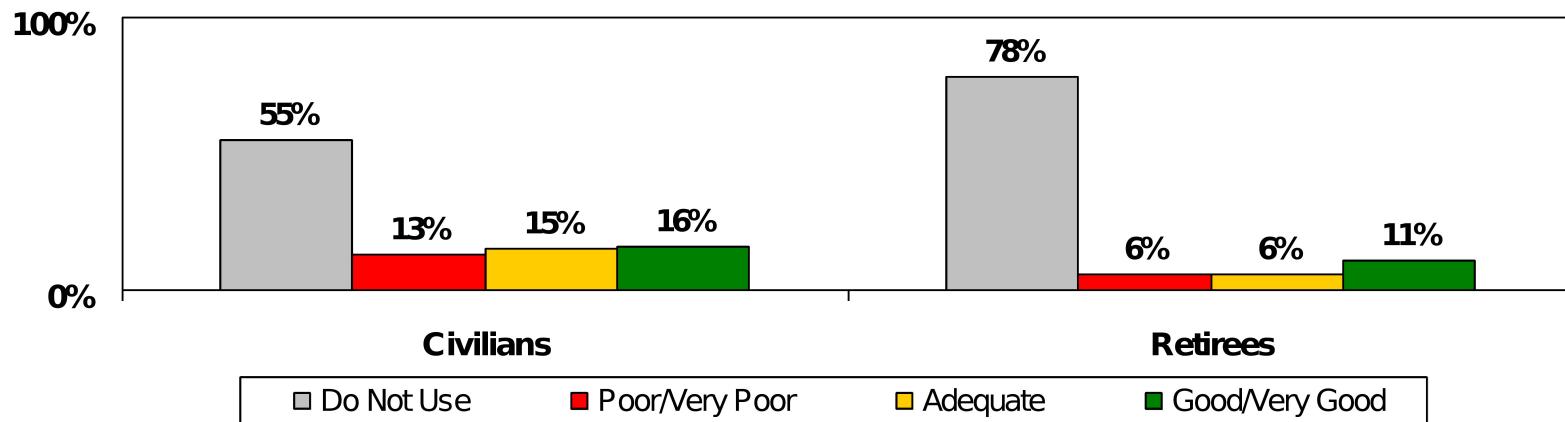
Quality of Off-Post Services



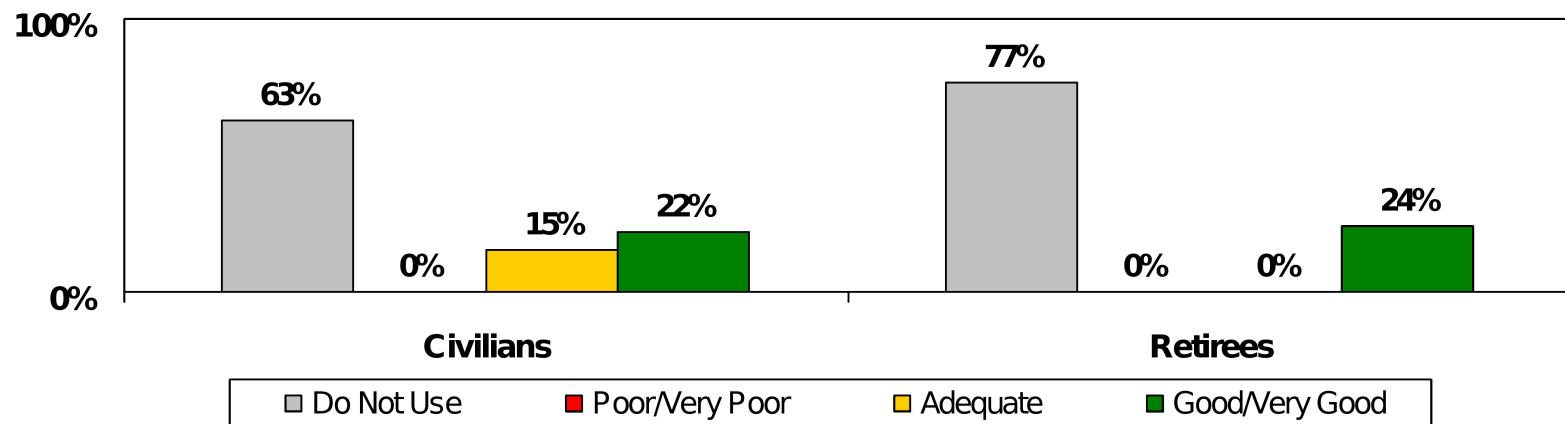
MWR PROGRAMS & FACILITIES: CATERING SERVICES QUALITY

Fort A.P. Hill

Quality of On-Post Services



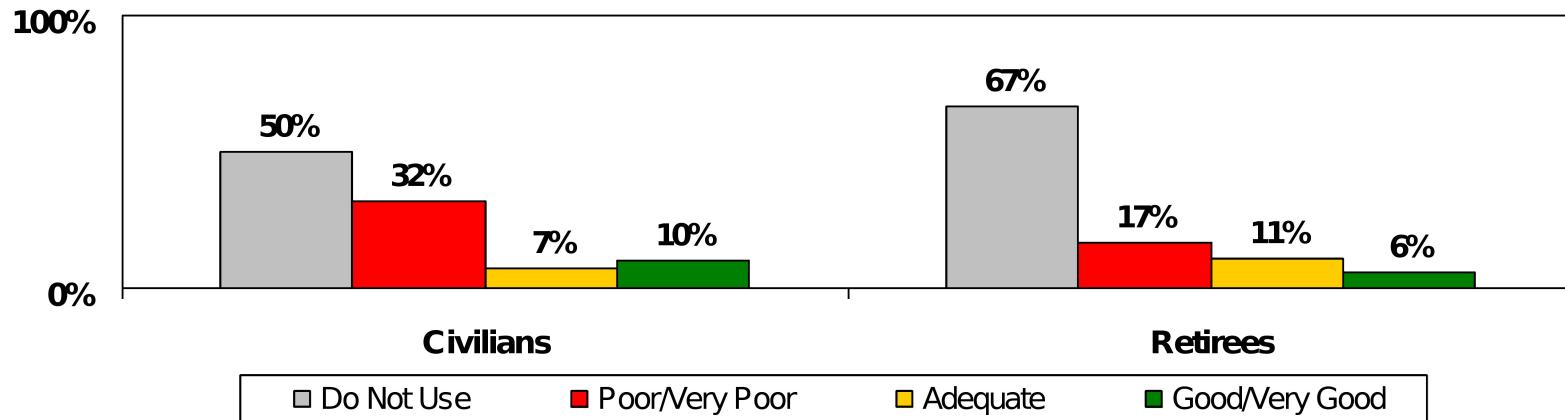
Quality of Off-Post Services



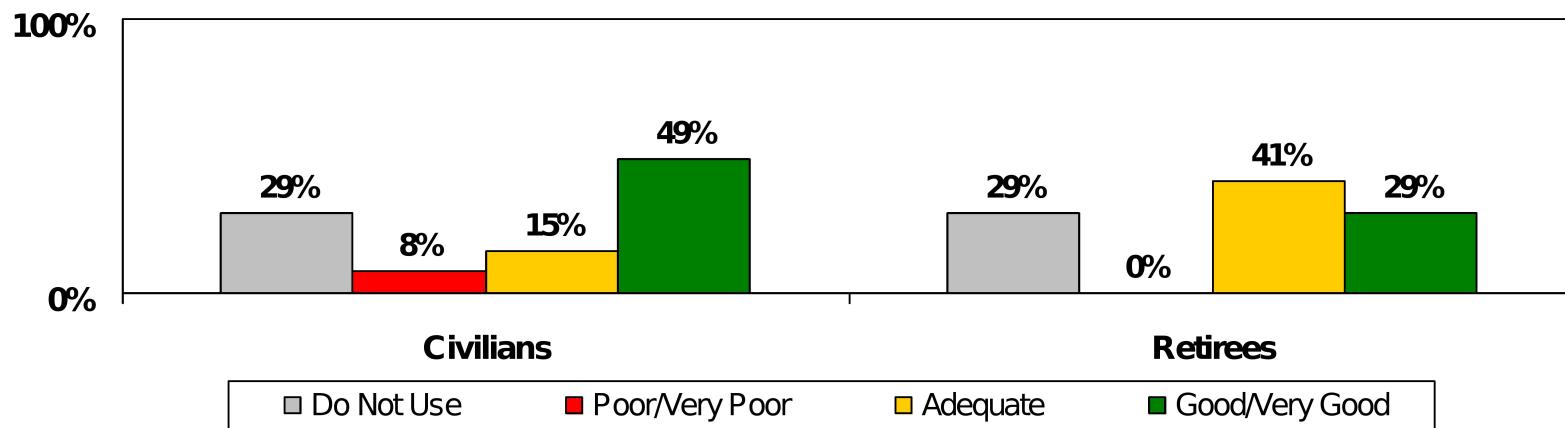
MWR PROGRAMS & FACILITIES: ENTERTAINMENT SERVICES QUALITY

Fort A.P. Hill

Quality of On-Post Services

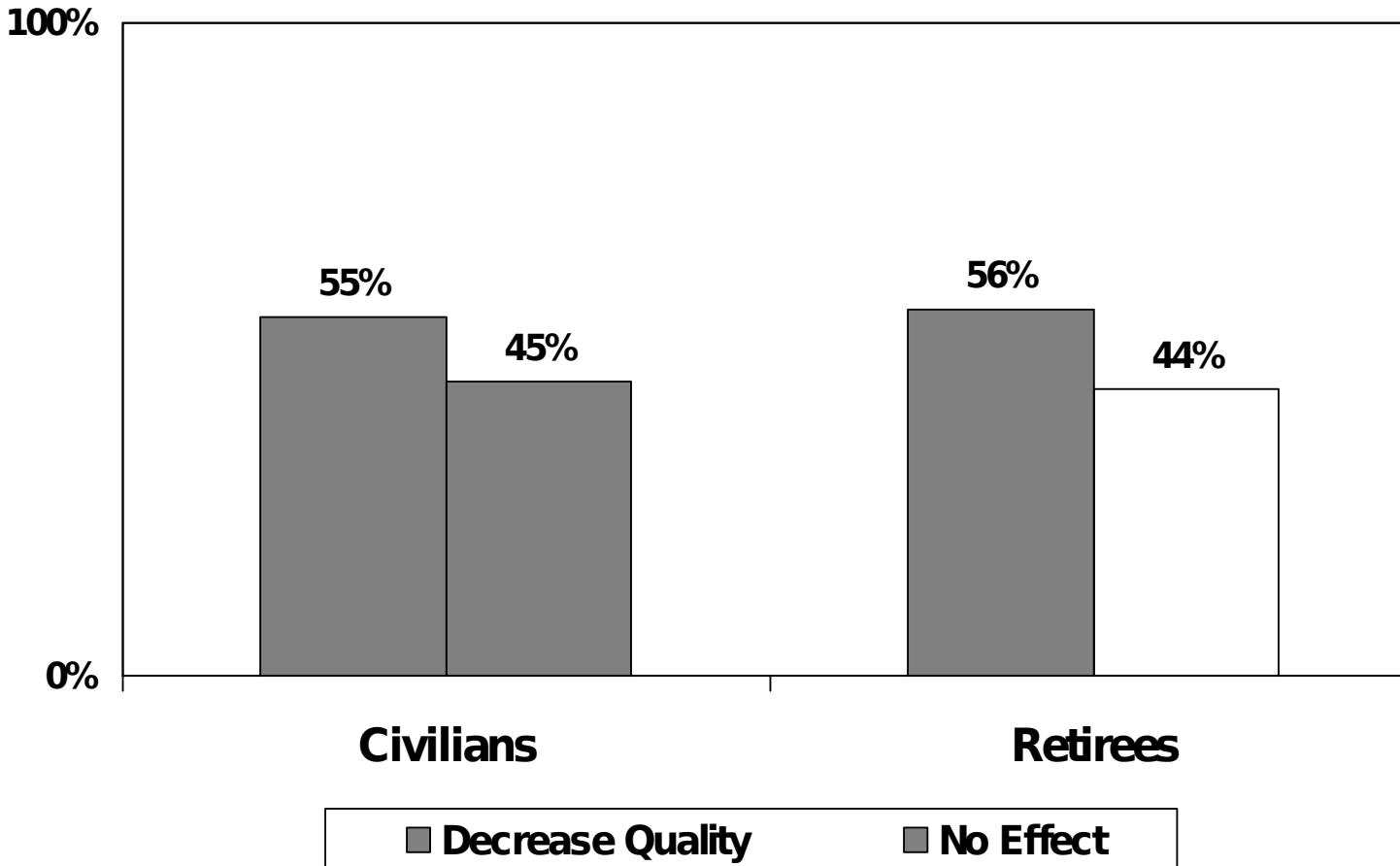


Quality of Off-Post Services



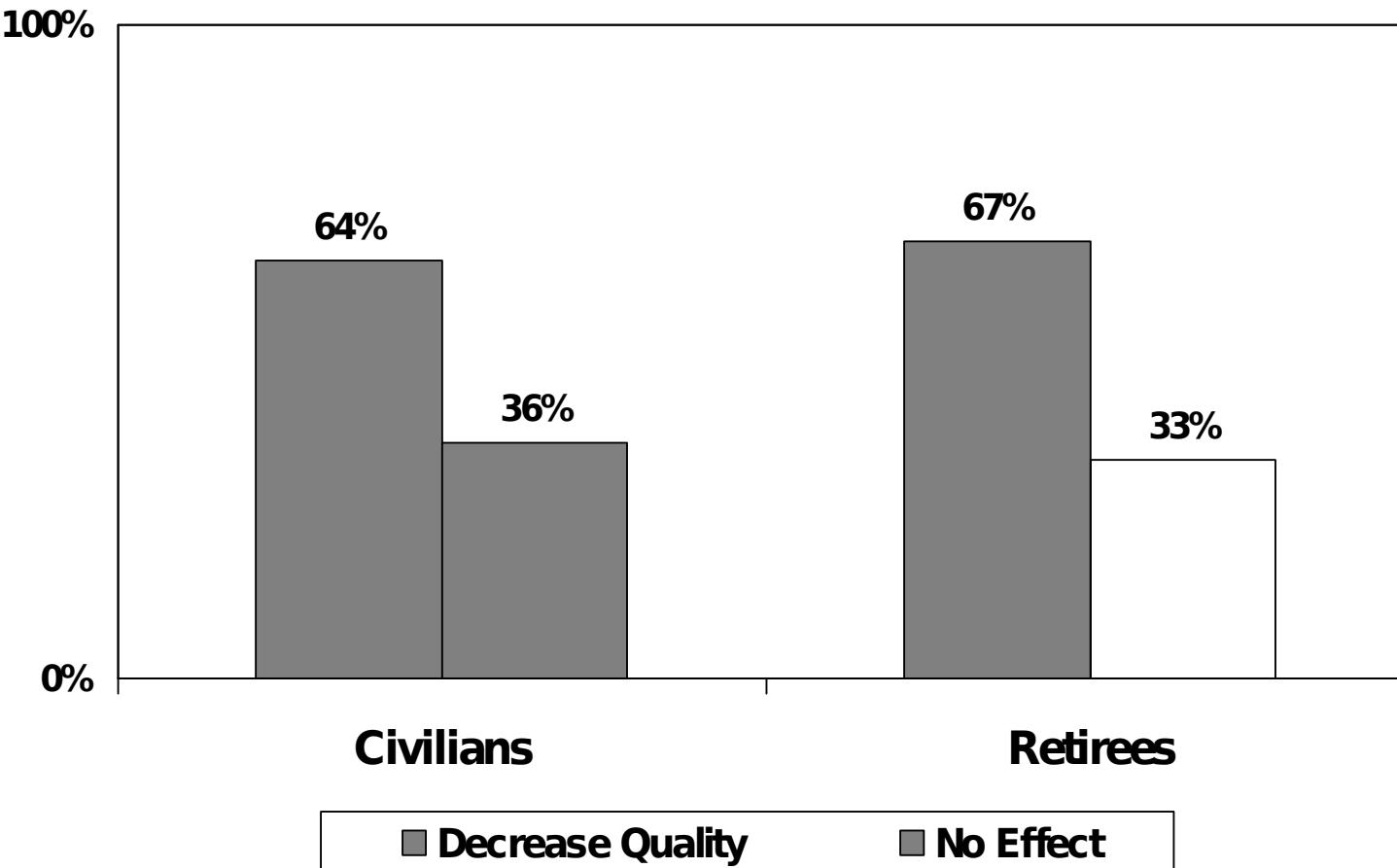
MWR PROGRAMS & FACILITIES: CLUB PROGRAM ELIMINATION EFFECT ON ARMY QOL

Fort A.P. Hill



MWR PROGRAMS & FACILITIES: RECREATION PROGRAM ELIMINATION EFFECT ON ARMY QOL

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MWR PROGRAMS & SERVICES: MOST AND LEAST IMPORTANT ACTIVITIES/PROGRAMS

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Top 7 Activities/Programs

Fitness Center/Gymnasium	69%
Army Lodging	66%
Post Picnic Area	57%
Cabins & Campgrounds	56%
Swimming Pool	45%
Car Wash	44%
Recreation/Community Activity Center	42%

Respondents were asked to select the 7 most important and 7 least important activities and programs offered on an Army installation.

Golf Course Pro Shop	72%
Golf Course	65%
Bowling Pro Shop	59%
Golf Course Food & Beverage	55%
Arts & crafts Center	45%
Bowling Center	45%
RV Park	42%

Bottom 7 Activities/Programs

MWR PROGRAMS & SERVICES: SOURCES OF INFORMATION*

Fort A.P. Hill

WHERE DO YOU GET INFORMATION?	CIVILIANS	RETIREES	TOTAL
Internet	10%	11%	10%
E-mail	91%	28%	71%
Friends and neighbors	19%	22%	20%
Family Readiness Groups (FRGs)	0%	6%	2%
Bulletin boards on post	29%	22%	29%
Post newspaper	51%	28%	46%
MWR publications	22%	11%	18%
Radio	0%	0%	0%
Television	0%	0%	0%
My child(ren) let(s) me know	0%	0%	0%
Other unit members or co-workers	28%	22%	27%
Unit or post commander or supervisor	14%	6%	14%
Marquees/billboards	7%	6%	6%
Flyers	43%	17%	37%
Other	0%	39%	12%
I never hear anything	1%	17%	6%

*The top 3 sources of MWR information are shaded for each patron group and the total population.

LEISURE ACTIVITIES: PREFERENCES OVERALL AND BY PATRON GROUP

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Top 10 Leisure Activities for All Respondents

Watching TV, videotapes, and DVDs	62%
Entertaining guests at home	59%
Internet access/applications (home)	57%
Going to movie theaters	47%
Plays/shows/concerts	46%
Walking	45%
Going to beaches/lakes	44%
Special family events	44%
Gardening	42%
Live entertainment	37%

Top 5 for Civilians

Watching TV, videotapes, and DVDs	71%
Entertaining guests at home	63%
Internet access/applications (home)	62%
Going to beaches/lakes	50%
Going to movie theaters	50%

Top 5 for Retirees

Watching TV, videotapes, and DVDs	50%
Internet access/applications (home)	50%
Entertaining guests at home	47%
Fishing	44%
Walking	42%

LEISURE ACTIVITIES: PREFERENCES BY ACTIVITY CATEGORY

Fort A.P. Hill

Team Sports	
Softball	12%
Volleyball	7%
Basketball	5%
Touch/flag football	4%
Self-directed sports tournaments	4%

Sports and Fitness	
Walking	45%
Cardiovascular equipment	28%
Weight/strength training	25%
Bowling	20%
Group exercise classes	19%

Outdoor Recreation	
Going to beaches/lakes	44%
Fishing	35%
Picnicking	32%
Bicycle riding/mountain biking	25%
Camping/hiking/backpacking	23%

Entertainment	
Watching TV, videotapes, and DVDs	62%
Going to movie theaters	47%
Plays/shows/concerts	46%
Live entertainment	37%
Attending sports events	34%

Social	
Entertaining guests at home	59%
Special family events	44%
Happy hour/social hour	27%
Dancing	25%
Specially arranged shopping trips	24%

Special Interests	
Internet access/applications (home)	57%
Gardening	42%
Computer games	34%
Digital photography	26%
Automotive detailing/washing	23%

LEISURE ACTIVITIES: MARKET SHARE OF ACTIVITY PREFERENCES ON POST*

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ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	OVERALL PARTICIPATION
Reading	27%	N/A	27%
Internet access (library)	21%	N/A	21%
Adult activities	19%	N/A	19%
Multi-media (videos, DVDs, CDs)	16%	N/A	16%
Study/self development	15%	N/A	15%
Reference/research services	14%	N/A	14%
Picnicking	9%	24%	32%

*Top 7 leisure activity preferences ranked by on-post participation.

LEISURE ACTIVITIES: MARKET SHARE OF SPECIAL INTEREST ACTIVITY PREFERENCES BY LOCATION*

Fort A.P. Hill

ACTIVITIES	PARTICIPATED PRIMARILY ON POST	PARTICIPATED PRIMARILY OFF POST	PARTICIPATED PRIMARILY AT HOME	OVERALL PARTICIPATION
Internet access/applications (home)	1%	7%	49%	57%
Gardening	0%	1%	41%	42%
Computer games	0%	2%	31%	34%
Digital photography	2%	5%	18%	26%
Automotive detailing/washing	2%	8%	12%	23%
Automotive maintenance & repair	0%	7%	15%	23%
Computer graphics/design	2%	0%	16%	19%

*Top 7 special interest activity preferences ranked by overall participation.

NEXT STEPS

Fort A.P. Hill

□ **INSTALLATION REPORTS**

- Review information on 91 leisure activities and up to 40 MWR facilities
- Share with Commander and program managers

□ **DATA APPLICATIONS**

- Action planning for program change and enhancement
- Strategic business planning
- Five year program planning
- Priorities for Project Validation Assessments
- Follow-up focus groups on items of interest or for clarification of findings
- Input into the Installation Status Report (ISR)